

DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SOLUTIONS
ADMINISTRATOR'S MEMO SERIES

NOTICE 04-07

ISSUE DATE: 04/01/2004
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RE: 2004 REQUIRED TRAINING
FOR WISCONSIN WORKS
AND RELATED WORKERS

To: County Departments of Human Services Directors
County Departments of Social Services Directors
Tribal Chairpersons/Human Services Facilitators
Tribal Economic Support Directors
W-2 Agency Directors

From: Bill Clingan /s/
Division Administrator

Purpose

The Department of Workforce Development (DWD), Division of Workforce Solutions (DWS), will continue to require training for Wisconsin Works (W-2) and related workers in county, private, and tribal W-2 agencies*. The requirements are based on Administrative Rule DWD 17 (February 1, 2003) and operational needs.

Introduction

This Administrator's Memo restates prior years' policy and process with the addition of:

- a description of the evaluation process for agencies which utilize the Department's new worker curriculum to provide in-house training, and
- reference to the W-2 contract requirement that W-2 staff receive training in coordination with local child welfare and other community agencies (Section 9.6 of the Wisconsin Works (W-2) and Related Programs Contract).

This Administrator's Memo outlines both the initial and the ongoing training requirements for

* These requirements apply only to tribal agencies that are administering the state TANF program.

W-2 Financial Employment Planners (FEP) and Resource Specialists (RS). Definitions provided by DWD 17.02:

- A FEP is a case manager employed by a W-2 agency who determines eligibility, assists in the process of determining eligibility, or performs case management functions.
- Case management is the family centered and goal oriented process for assessing the needs of a W-2 group member and his or her family for employment, training, and supportive services and assisting the W-2 group member in obtaining services to achieve self-sufficiency (DWD 17.02 [3]).
- A RS is a worker employed by a W-2 agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. Resource Specialist may also include a worker employed by an agency contracted with the department to provide access services.

The training requirements stated in this Administrator's memo reflect those for calendar year 2004 (January 1 through December 31, 2004).

It is important to make the distinction between new and experienced workers. The following definitions are taken from DWD 17.02 and should be used by W-2 agencies to make decisions regarding staff training requirements.

- Experienced worker means a W-2 Financial Employment Planner, or Resource Specialist employed by a W-2 agency before the effective date of subsection DWD 17.02, February 1, 2003, or a worker who has completed appropriate W-2 New Worker (initial) or related training.
- New worker means a person who is employed by a county or tribal W-2 agency as a W-2 Financial Employment Planner or Resource Specialist on or after the effective date of subsection DWD 17.02 (February 1, 2003), including a permanent employee who transfers into a W-2, or related worker (FEP, RS) position and who has not completed initial program training.

RESPONSIBILITIES OF THE STATE

DWS/BPS Partner Training Section

The Division's Partner Training Section is responsible for coordinating all training related to W-2 and associated programs. The goal of training is to support local agencies as they administer these programs. This support will include the development, delivery, and maintenance of quality training services. Training events will be planned, managed, provided, and coordinated by the DWS Partner Training Section.

RESPONSIBILITIES OF COUNTY, PRIVATE AND TRIBAL W-2 AGENCIES

Wisconsin Works (W-2) Agency Training Liaisons (ATL)

Each county, private, or tribal W-2 agency must designate an Agency Training Liaison (ATL), as a point of contact for training issues. The Area Administrator (AA) is to be provided with the name of the ATL, and changes in personnel need to be reported to the AA. The ATL does not need to be a full-time trainer position. The ATL is to work with the Partner Training Section on training activities and issues.

Local agencies will be responsible for the general development of their employees and for training not offered by the Department. It is the W-2 agency's responsibility to ensure that their staff has the skills needed to perform job functions. W-2 agencies are responsible for:

- ensuring that all W-2 and related staff complete the prescribed Department training;
- ensuring that new and experienced W-2 and related workers are trained in a timely manner on all W-2 and related programs policy, procedure, and automated system updates that are issued by the Department;
- ensuring that subcontracted staff complete required training;
- ensuring that the agency supplements Department training to specifically meet the needs of the agency and their workers, including training on local processes;
- maintaining automated records of staff training, such as types of training attended and the dates attended (the DWS/BPS Partner Training Section will maintain files of DWS sponsored training);
- establishing an ongoing method of assessing its training needs and completing a training needs assessment; and,
- ensuring that staff is literate in personal computers and word-processing software. (The Department recommends working with local technical colleges and private providers as appropriate to meet these training needs.)

NEW W-2 Financial and Employment Planners (FEP) and Resource Specialists (RS)

New Worker Training Program

All FEPs and RSs employed by a county, private or tribal W-2 agency must complete the New Worker Training program. The W-2 agency shall ensure that each new FEP or RS completes the Department's initial training during the first six months of employment (DWD 17.03[2]). It is the Department's intent to supply sufficient opportunities for this learning to occur. The W-2 New Worker process can be accessed through the Partner Training Section's home page at <http://www.dwd.state.wi.us/dwspts/default.htm>.

No FEP may make independent decisions related to eligibility or perform case management functions until the initial W-2 training is successfully completed (DWD 17.03{2[6 b]}).

No new Resource Specialist may make independent decisions related to providing an initial assessment of potential W-2 applicant's needs, making referrals to service providers, or evaluating an individual's need for W-2 until the initial W-2 training is successfully completed (DWD 17.03{3[6 b]}). Completion of the New Worker program requires involvement and participation in all appropriate instructional activities. The topics contain the knowledge and skill areas needed to assist workers in successfully understanding the administration of W-2 and other related programs. The topics have been identified and incorporated to help the administrative agencies meet performance and quality assurance standards.

The W-2 agency shall develop evaluation strategies to ensure that a new W-2 worker achieves a minimum standard of competence (DWD 17.03[2]).

Comparable Training

A W-2 agency that chooses not to participate in the Department sponsored New Worker Training Program shall develop a plan to implement the standardized New Worker curriculum

developed by the Department. This plan should include the qualifications of the trainer, the specific plans for implementing the standardized curriculum, and the facilities available within the agency to conduct New Worker Training.

An agency can submit a request to implement the full curriculum or any part of the curriculum. If an agency plans to provide a portion of the full curriculum, their new workers will participate in additional training activities scheduled by the Department to complete the New Worker training requirements for their job function.

The implementation plan shall be submitted to the DWS Partner Training Section for approval prior to the planned starting date of training when it is first offered, and annually after that. In addition, each approved agency must submit a schedule for each series of New Worker Training classes prior to the start date of that series. This schedule shall be reviewed and approved by the Partner Training Section. One of the key criteria for approving an agency's request to administer the standardized curriculum is the availability of an employee dedicated to staff training responsibilities. Specifics of the plan are described in DWD 17.04(3). Contact Lynda Fischer, New Worker Training Operations Lead, lynda.fischer@dwd.state.wi.us with questions regarding what to include in the required implementation plan.

Evaluation of local delivery of New Worker training

Beginning with all 2004 approvals for independent New Worker Training, an evaluation process will be implemented. The process includes observation of face-to-face classes provided within approved agencies as well as discussions with new workers and evaluations of knowledge based on training provided. Partner Training Section (PTS) staff will conduct evaluations, and the results of the evaluation will be provided to the agency trainer. PTS will follow up with agencies to discuss any improvements needed in the training program with the intent of providing support and to assist agencies in providing quality New Worker Training utilizing the Department's curriculum. The results of the evaluation will also be provided to the Area Administrator for action as deemed necessary. Contact Lynda Fischer at lynda.fischer@dwd.state.wi.us for details of the evaluation process.

Additional Training for New Workers

There are additional requirements for W-2 new workers, per DWD 17.03. These requirements must be completed within the first year of employment.

- New Financial and Employment Planners (FEPs) shall complete 12 hours of training in domestic abuse awareness, including case management strategies and the use of the department's comprehensive screening tool. (*Note: this course counts as 12 hours of Enhanced Case Management [ECM] training.*)
- New Resource Specialists (RSs) shall complete 6 hours of training on domestic abuse. (*Note: this course counts as 6 hours of ECM training.*)

EXPERIENCED W-2 Workers

Following are the CY2004 training requirements for experienced W-2 workers:

Professional Development Requirement

A minimum of twelve hours of professional development is an annual requirement of all experienced W-2 workers and supervisors within W-2 and related programs.

Professional development includes, but is not limited to, DWS Enhanced Case Management programs, conferences, technical college courses, seminars, workshops, and/or policy and procedure refresher training. This professional development training does not need to be conducted or sponsored by Department staff. The county, private, or tribal W-2 agency will select the appropriate professional development training for each of their workers and maintain records to document that this requirement has been met. Agencies will have full discretion as to what training fulfills this requirement for each employee, but training records, as described, must be maintained to document completion.

Enhanced Case Management Training

Twelve hours of Enhanced Case Management activities are an annual requirement of all experienced W-2 workers and supervisors within W-2 and related programs for calendar year 2004. Enhanced Case Management programs develop the ability of supervisors and workers to provide quality services to all of their customers, including customers with special needs. Enhanced Case Management topics are interpersonal skills, special needs, programmatic, and supervisory skills training programs.

These topics will be offered as classroom programs or through alternate methods. Classroom programs will be offered on a regional basis. The topics are divided into four subcategories:

- Programmatic - These courses focus on developing knowledge and skills which will enhance interaction with customers, improve caseload management, promote strategies for meeting program requirements, and assist in determining appropriate program placement. Topics include "Customer Service Strategies," "Interviewing with Style," and "Case Management Interventions."
- Special needs - These courses assist staff in understanding behavioral, physical, and situational challenges which may require accommodation, outside intervention, or special strategies in working with a customer. Topics include "Families with Children with Special Needs," "Blueprint for Shelter: When Customers Face Housing Issues," "Teen Parents: Working with Pregnant and Parenting Teens," and "Trauma: Its Effects on Customers."
- Interpersonal skills - These courses assist staff in developing skills and strategies for effective communication, teamwork, customer service, and personal growth and development. Topics include "Diversity: Making Cultural Connections through Self Awareness" and "Giving and Receiving Feedback for Growth and Continual Effectiveness."
- Supervisory - These courses are designed for current supervisors and those preparing for supervisory roles. They will help supervisors and lead workers to work effectively with staff to meet program and agency goals through practical applications and sharing of best practices.

Enhanced Case Management Topics are identified as such in the course descriptions.

ALL W-2 AND RELATED WORKERS

New Policy and Refresher Training

As new policy is developed and implemented, affected workers must attend the appropriate training sessions. Refresher training will be identified as required training based upon Department decisions and standards. Course descriptions will identify the required programs.

Coordination of W-2 Agencies and Local Child Welfare Agencies

Section 9.6 of the Wisconsin Works (W-2) and Related Programs Contract for the period from January 1, 2004, through December 31, 2005, requires that W-2 agency Financial and Employment Planners (FEPs) receive training in coordination with local child welfare and other community agencies to facilitate the employment of W-2 participants, their well-being, and the well-being of their children. An Operations Memo will follow to describe DWS training opportunities related to Child Welfare issues.

Waivers and Training Equivalencies

The DWS Partner Training Section will accept reasonable, justified proposals to waive individual training program requirements or to approve training equivalencies.

If a W-2 agency desires a waiver or to have training designated as equivalent to Enhanced Case Management material, they must submit a request outlining the reasons for the request to the appropriate Area Administrator. The proposal must include documentation, such as training course outlines, course materials, curriculum guides, and/or documentation of equivalent experience. If the waiver is related to substituting another training program or experience for a DWS requirement, the proposal must detail how that curriculum/experience accomplishes the objectives of the DWS program. The waiver request is available on line at http://www.dwd.state.wi.us/dwspts/resourcewebs/SupCentral/home_first-time.htm

Waiver/equivalency requests will be reviewed on a case-by-case basis. The DWS Partner Training Section will communicate a decision no later than 30 days from the date of receipt of the request.

Training Records

Each W-2 agency is required to keep records of all training attended by each worker. The records must be maintained in an automated system that can sort by both training participant and training program information. **At a minimum, the categories of information collected should include the employee name, position title, date of assumption of the position, training program, date of program, number of hours attended, and sponsoring organization of the training. Approved waivers/equivalencies for ECM requirements should be indicated.**

A sample training report:

<u>Employee name</u>	<u>Position Title</u>	<u>Position Hire date</u>	<u>Training Program</u>	<u>Date of Training Program</u>	<u>Numbers of hours attended</u>	<u>Sponsoring Organization</u>	<u>Approved ECM waiver/ equiv.</u>
Sue Smith	FEP	01/03/02	Domestic Abuse	02/03/02-02/04/02	12	DWS/ BPS	NA
Sue Smith	FEP	01/03/02	Mental Health Diagnostics and their Effects on Employment	09/14/02	6	WETA Mini-Conference	Yes

Training reports will be sorted by training participant and submitted on a yearly basis to the appropriate Area Administrator by the second Friday in January.

The DWS Partner Training Section will also maintain training records for workers who attend DWS sponsored programs.

SUMMARY OF TRAINING REQUIREMENTS

The following is an outline of requirements for both new and experienced W-2 workers:

New Workers

1. New Worker Training Program
2. Domestic abuse (12 hours for FEPs, 6 hours for RSs)

Experienced Workers

1. New Policy and refresher training specific to job functions and duties
2. Enhanced Case Management (12 hours)
3. Professional development (12 hours)

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